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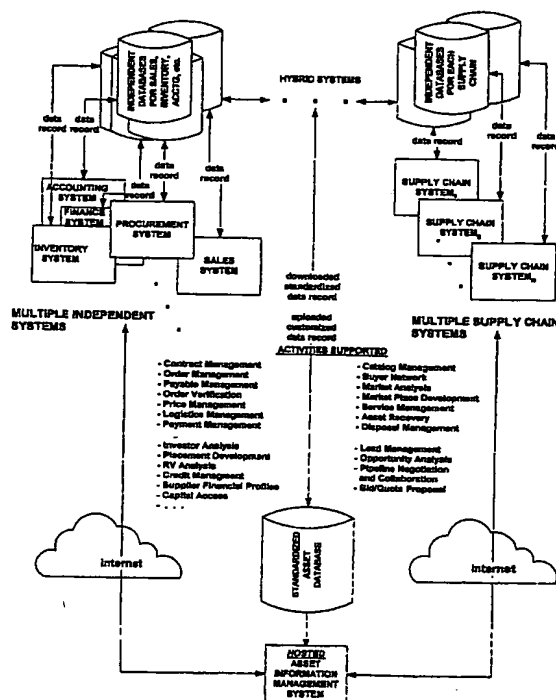
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(54) Titre : PROCEDE ET SYSTEME ASSISTE DE GESTION DE L'INFORMATION DES BIENS

(54) Title: HOSTED ASSET INFORMATION MANAGEMENT SYSTEM AND METHOD



(57) Abrégé/Abstract:

A system and method for managing asset information is presented for both a standalone architecture and as a component of a total asset management system. The range of users for the system and method of the present invention spans single users to partners of a supply chain and in the latter case, cross-organization asset detail information is provided to supply chain partners. The system and method of the present invention is intended to be interfaced with other components of a total asset management system, e.g., a procurement system for asset acquisition, and may be interfaced to legacy systems.

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ABSTRACT OF THE DISCLOSURE

A system and method for managing asset information is presented for both a standalone architecture and as a component of a total asset management system. The range of users for the system and method of the present invention spans single users to partners of a supply chain and in the latter case, cross-organization asset detail information is provided to supply chain partners. The system and method of the present invention is intended to be interfaced with other components of a total asset management system, e.g., a procurement system for asset acquisition, and may be interfaced to legacy systems.

HOSTED ASSET INFORMATION MANAGEMENT SYSTEM AND METHOD

CROSS REFERENCE TO RELATED APPLICATION

5 This is a non-provisional application claiming the benefit of provisional application number 60/244,916 filed on November 2, 2000, the entire disclosure of which is hereby incorporated by reference.

10 BACKGROUND OF THE INVENTION

1. Field of the Invention

15 The present invention relates to the field of asset information management for supply chains of partner organizations. In such a supply chain, as the individual partners acquire, finance, and service assets from one another, these assets are both used and transformed into other assets which may travel further in the supply chain. Information about these assets can be captured
20 in a data store whenever individual asset-related transactions between partners are facilitated by an asset management system. Asset information in such a data store replaces physical inventory as the means of most competitively satisfying customer demand.

25 More particularly, the present invention is directed to an independent Internet accessible and web-based system and method for a hosted system that manages access to and reporting of supply chain asset information.

30

2. Discussion of the Prior Art

Supply chain systems and asset information management systems are known in the art. These known systems employ a range of architectures, including, tightly coupled dedicated database systems and federated independent database systems to manage and share their asset information. But, regardless of the architecture of the database component of these systems, the asset information management functions of these existing supply chain systems are tightly coupled to other functions, such as procurement, sales, and accounting and the focus of existing systems has been to reflect the characteristics of physical inventory.

Taking an independent view of the information systems for managing assets across a supply chain, such systems must provide access to a broad spectrum of supply chain asset information to enable partner organizations who participate in the supply chain to manage their businesses and not just their own assets. Asset information systems have historically been directed to capturing and reporting information about such activities as purchasing, installation, leases, status, etc., with respect to the inventory of an organization's assets. Today, any information necessary for the management of a business is a candidate for inclusion in an asset information system, especially information about how these assets appear as they travel in their chains of suppliers. The range of asset information needed to manage an organization's business is considerably broader than an information about the organization's individual inventory of assets.

The suppliers and purchasers of assets participate as partners in many supply chains, each possibly as functionally broad as the range extending from raw material providers, to intermediate

component manufacturers, to assemblers, to vendors, to trainers, to deliverers, to maintainers, to financiers, and to remarketers. These functions are not necessarily all performed by different partners. Viewed from this perspective, these partners form an extended enterprise. This extended enterprise is linked by the asset information about their products and services as these products and services and information about them traverse possibly multiple supply chains, as well as subsequently as data to be mined for historical trends. Global data models and standard data management functionality form the foundation for the asset information management required by participants in such an extended enterprise. What is usually available is a conglomeration of different levels of detail and summary data created and stored to meet the specific needs of individual organizations and independent supply chains.

Most partners in supply chains also have functionally-oriented legacy systems for managing their businesses and their asset information. Few have historically provided external partners access to these internal systems and their information stores. This is true for independent businesses participating in a supply chain and it is just as true for vertically integrated businesses where different departments and divisions function in much the same manner as independent businesses, due to their cost center orientation.

These functionally specific internal legacy systems have evolved as either loosely or tightly coupled with asset information and asset management components. The architecture of such legacy asset management components varies from one system to the next but is ill-suited to electronic linking over the Internet, a requirement resulting from more and more demand being placed on

participants to provide their partners in chains of suppliers with web-based access to their private asset information (for assets traversing the supply chain). Access to asset information and functions is needed by partners to enhance each partner's management of its business, e.g., to support contract, payable, and order management by each partner. For example, a partner who supplies raw materials has an aged inventory of such materials over time derived from purchases of raw materials from sources in anticipation of demand from partners and accounts payable resulting from these purchases; contracts with both sources and supply chain partners, and orders resulting from these contracts; etc. Access to partner information is needed by such a supply chain partner to manage contracts, orders, and payables and as well as to verify orders.

Externally, asset information management is expanding to include non-asset as well as asset information about supply chain partners and has grown in importance as more of each partner's success depends on this information, so much so, that functions such as inventory pipeline management and accounting are now subsidiary functions of asset management. The chain of suppliers involved in producing, financing, delivering and maintaining assets, i.e., the external extended enterprise, and the supply process itself are now the focal points of expanded asset management systems in which information has replaced inventory. Predictably, functionally oriented legacy systems cannot easily be changed to reflect this reordering of importance of functions or the shift to an external extended enterprise focus for the supply chain process. And in fact, existing internal systems have not accommodated this shift in focus. Internal legacy systems are almost never available to other supply chain partners because they

include information that an organization does not want to share or make public, these systems were never intended to be externally accessible and are not sufficiently robust, and retrofitting such systems is either not economically attractive or not technically feasible, or both.

The extended enterprise exists by virtue of the Internet. The Internet has enabled business-to-business interaction and formation of relationships to take place at unprecedented speed and with incredible visibility. Maintaining this form of business interaction will require an ever-increasing and unprecedented level of information intimacy, currency, and reliability which most individual businesses are ill-prepared to undertake on their own.

Thus, there is a need for a reliable Internet-accessible system and a method to support management of assets across organizations and well as within them, a system and method which emphasize the asset information intensity and extended enterprise characteristics of Internet-based supply chains which extend across multiple enterprises and which intersect.

SUMMARY OF THE INVENTION

The system and method according to the present invention are a hosted response to the need for an Internet-accessible asset information management system identified above. This hosted system is meant to be both a standalone asset information system, illustrated in FIG. 1a, as well as a component of a total asset management system, illustrated in FIG. 1b, a component that provides the information management dimension for supply chain partners to manage their businesses by leveraging their supply chain participation.

The hosted asset information system of the present invention is functionally and informationally architected to be open. As supply chain partners gain experience and grow comfortable with asset information accessibility and reliability, the system and method of the current invention are architected to be able to expand to encompass more and more functions and data once held exclusively within the confines of each partner's organization, e.g., contract terms, and price controls.

The hosted asset information management system of the present invention provides cross-organization asset detail information; asset location, contact and maintenance information; invoice, financial, and charge back information; and other information needed by supply chain partners to manage their participation in a supply chain. Such information is created, stored, accessed and updated in a standard way regardless of the source or user of the information. In the hosted approach of the present invention, not only are uniform data storage and access techniques imposed, but integrity, reliability and accessibility are also inherent in the system and method according to the present invention.

One preferred embodiment of the present invention provides a range of asset information reports which can be viewed, printed and downloaded either in report format or a format suitable for input to legacy systems (manual or automated). These comprehensive report and download features include, among others, purchase order, cost center, purchasing agent, installation, rebilling, status, soft costs lease summary and termination reports and files which are selected and customized from a web-page interface.

The present invention enables supply chain partners (which includes customers) to leverage information about their products, services, and assets by, among others:

- Converting existing asset information practices to Internet processes;
- Replacing inventory with information;
- Creating a standardized, reliable, accessible repository of asset information across the extended enterprise;
- Providing many partners with access to asset information management functionality not previously available to them due to resource constraints;
- Guaranteeing the integrity of the information store;
- Delivering business intelligence in a format that can be interfaced with legacy systems; and
- Reducing administrative costs.

All of these effects create immediate cost savings and result in long-term efficiencies.

BRIEF DESCRIPTION OF THE DRAWINGS

A more complete understanding of these advantages and other advantages of the present invention may be acquired by referring to the following description taken in conjunction with the accompanying drawings, in which like reference numbers indicate like features and wherein:

FIG. 1a is a block diagram of one preferred embodiment of a hosted asset information management system according to the present invention as a standalone system.

FIG. 1b is a block diagram of a comprehensive asset management system which interfaces with a hosted asset management system, including the asset information management system according to a

preferred embodiment of the present invention illustrated in FIG. 1a.

FIG. 2 is an exemplary Asset Information Screen.

FIG. 3 is an exemplary report specification screen.

FIG. 4 is an exemplary main menu bar.

FIG. 5 is an illustration of the Asset Lookup function in the Asset Information screen according to an embodiment of the present invention.

FIG. 6 is an exemplary display of selected assets in the lower half of a screen.

FIG. 7 is an exemplary display resulting from the selection of the Asset Tab.

FIG. 8 is an exemplary display resulting from the selection of the Option Tab.

FIG. 9 is an exemplary display resulting from the selection of the Location Tab.

FIG. 10 is an exemplary display resulting from the selection of the Contacts Tab.

FIG. 11 is an exemplary display resulting from the selection of the Cost Center Tab.

FIG. 12 is an exemplary display resulting from the selection of the Maintenance Tab.

5 FIG. 13 is an exemplary display resulting from the selection of the Invoice Tab.

FIG. 14 is an exemplary display resulting from the selection of the Finance Tab.

10 FIG. 15 is an exemplary display resulting from the selection of the Charge Back Tab.

FIG. 16 an exemplary range of reports available.

15 FIG. 17 is an exemplary Purchase Order Report in summary format.

FIG. 18 is an exemplary Cost Center Report in summary format.

20 FIG. 19 is an exemplary Purchasing Agent Report in summary format.

FIG. 20 is an exemplary Installation Report in summary format.

FIG. 21 is an exemplary Rebill Report.

25 FIG. 22 is an exemplary Status Report.

FIG. 23 is an exemplary Soft Cost Report.

30 FIG. 24 is an exemplary Lease Summary Report.

FIG. 25 is an exemplary Termination Report .

FIG. 26 illustrates the format options for saving report data in a file in a preferred embodiment.

Figs. 27a-d is a schema for a relational database of a preferred embodiment.

DETAILED DESCRIPTION OF THE INVENTION

The present invention provides an Internet-based hosted system and method for accessing and reporting on the asset information associated with an extended enterprise of supply chain partners. The asset information is captured by other systems and accessed by the system and method of the present invention.

In one preferred embodiment, the asset information is captured in a relational asset information database by other independent systems, such as the procurement system illustrated in FIG. 1c. In this preferred embodiment, two open classes of functions are provided for viewing, reporting, and downloading this database data: asset lookup and asset report/download. In this preferred embodiment, a user is presented with a Home web-page containing a main menu bar, as illustrated in FIG. 4, which contains:

- Home,
- Asset Lookup,
- Reports, and
- Logoff

as selection options.

ASSET DATABASE

When a customer procures an asset, that asset is placed onto a schedule. Depending on the business rules associated with that customer, the schedule may close with each item procured or may remain open for inclusion of additional items until some predefined closing condition is met. During the period in which a schedule remains open, it is billed on a daily basis for any outstanding items. Once the schedule is closed, no further items may be added to it and billing takes place on a periodic basis, usually monthly. During the time the asset remains in the possession of the customer, there will be other charges which are associated with the asset, e.g., maintenance and options. Further, the asset will be physically located at a location and possibly associated with a cost center. Asset detail and ancillary information, such as the forgoing, is managed by the hosted system and method of the present invention.

In one preferred embodiment, asset information associated with both schedules and other activities is captured in a relational database, as shown in the database schema of Figs. 27a-d. This data capture is not accomplished by the system and method of the present invention but by another, independent data producer, such as a procurement system. The database schema, illustrated in Figs. 27a-d, contains three types of relations or tables: constant tables, working tables, and cross-reference tables. Each table illustrated in Figs. 27a-d, contains a list indicating column name, data type and size, and whether or not the field can be empty (null). An underlined column name indicates that the data is so frequently used in searches of the table that it has been called out in an index. For example, the vendor table 271 has an index

of:

vend num NUMBER(12) not null

A table can have separate indexes, i.e., several columns can individually be indexed, as shown for the tax_rate table 275.

5 The database schema of the preferred embodiment, illustrated in Figs. 27a-d, is one means by which the asset information management system of the present invention can be hosted independently of any other independent systems that populate a database according to this schema. Thus, this database schema of
10 the preferred embodiment functions as an interface specification for the preferred embodiment of the present invention.

Constant Tables

15 In one preferred embodiment, constant tables contain information that changes very slowly and represents data infrastructure. This data is assigned unique identifiers which are used by working tables in place of the constant so that space is saved by not storing the constants wherever they are needed in the
20 working tables, and processing time is saved by only having to update a constant in one location (in the constant table) instead of having to update every table in which the constant appears.

Examples of constant tables include:

- contact 270;
- 25 • vendor 271;
- mfg 272;
- location 273; and
- product 274.

30 Working Tables

In one preferred embodiment, data which is actively updated is contained in working tables, e.g., the item table 276. Entries in working tables are automatically assigned a unique identifier, such as seq_num 277 in the item table 276.

Cross-Reference Tables

Cross-reference tables identify records in two or more tables that have some relationship. For example, as illustrated in FIG. 27b, the loc_item_rel table 278 contains pairs of unique identifiers for items (seq_num) and the location of that item (loc_num) in the item table 276 and the location table 273.

ASSET LOOKUP

In the preferred embodiment, selecting *Asset Lookup* from the main menu bar causes the display of the Asset Information Screen, illustrated in FIG. 5. The Asset Information Screen is the central screen of the *Asset Lookup* feature of the present invention, providing functionality which allows a user to search for an asset and then view a range of detailed information about the asset.

The Asset Information Screen comprises the Search feature 50, which is at the top of the screen in a preferred embodiment; tabs 52 in the top half of this screen to be used to display detailed information about the selected asset; and, in the bottom half 51 of the screen, the result of the user search from which an asset is selected to be viewed.

Search Options and Fields

SEARCH - The Search feature 50 is contained in the top half of the screen in a preferred embodiment. The Search feature searches the asset information, which is maintained in a database in a preferred embodiment, for the assets that match the criteria

entered in the *Status* 53 and *Search By* 54 fields. In a preferred embodiment the results of the search appear in a list of assets in the bottom half of the screen.

5 **STATUS** - The user is able to limit the asset records displayed in the bottom half of the screen by entering the status of assets to be displayed. The *Status* field 53 displays the complete list of available asset status, which, in a preferred embodiment are *All*, *Pending*, *Active*, *Inactive* and are presented in a drop-down list.

10 1. *All* is the option which displays all assets regardless of the status of the schedule the asset is attached to.

15 2. *Pending* is the option which displays assets of a pending schedule. A pending schedule is a current schedule that has not been activated. A schedule is pending during the acquisition period prior to the start date of the schedule. During this acquisition period asset information is subject to change as the system according to the present invention populates the database of the preferred embodiment with appropriate asset information of the schedule.

20 3. *Active* is the option which displays assets of an active schedule. An active schedule is a current schedule that has been activated. A schedule is activated when the start date of the schedule is reached, and a schedule remains active until the end date of the schedule.

25 4. *Inactive* is the option which displays assets of an inactive schedule. An inactive schedule is a schedule that is no longer active, because the schedule end date has passed.

30 **SEARCH BY** - Status displays the complete list of asset search options. Depending on the *Search By* option 54 selected, additional

value fields appear prompting the user to enter a value for the selected Search By option. Additional values for a preferred embodiment are shown in Table 1.

5

10

TABLE 1

SEARCH CRITERION	VALUE(S) TO BE ENTERED
Lease/Schedule	Select the required schedule from the <i>Schedule</i> drop-down menu.
Model Number	Select the required manufacturer and model number from the <i>Manufacturer</i> and <i>Model</i> drop-down menus.
Serial Number	Enter the required serial number in the <i>Serial Number</i> field.
Billing Code	Select required billing code from the <i>Billing Code</i> drop-down menu.
Location	Select the required location type from the <i>Type</i> drop-down menu, then enter the location name in the <i>Name</i> field.
Contact	Select the required contact type from the <i>Type</i> drop-down menu, then enter a contact name in the <i>Name</i> field.
PO Number	Enter the required purchase order number in the <i>PO Number</i> field.
Tracking ID	Enter the required tracking ID in the <i>Tracking ID</i> field.
Vendor	Select a vendor from the <i>Vendor</i> drop-down menu.

20

Cost Ctr/Dept	Select a cost center type from the <i>Type</i> drop-down menu, then select a cost center from the <i>Name</i> drop-down menu.
Option - Model #	Select the required manufacturer and model number from the <i>Manufacturer</i> and <i>Model</i> drop-down menus.
Option - Serial #	Enter the required serial number in the <i>Serial Number</i> field.
Option - Track ID	Enter the required tracking ID in the <i>Tracking ID</i> field.
Invoice Number	Enter the required invoice number in the <i>Invoice #</i> field.

Tab Descriptions

The *Asset Lookup 60* feature enables a user not only to search for an asset 61, but also to view a range of detailed information about the selected asset. Assets are displayed in the lower half 51 of the screen, as illustrated in FIG. 6, and in a preferred embodiment an asset is selected in the lower half for further display via the tabs, which in a preferred embodiment are contained in a row across the top half of the screen, see also FIG. 6.

ASSET - The Asset tab 70 displays detailed asset information for the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab displays the following fields in a preferred embodiment, illustrated in FIG. 7:

- Serial Number - the manufacturer serial number of the asset;
- Tracking Number - the unique identification number a partner assigns to an asset to track its use in the partner's organization;
- Purchase Order - the purchase order number the asset is attached to;

- **Manufacturer** - the name of the manufacturer of the asset;
- **Model Number** - the manufacturer's model number of the asset;
- **Vendor** - the vendor from which the asset was purchased;
- 5 • **Description** - a brief description of the asset;
- **Category** - in a preferred embodiment the system assigned categories to assets for purposes of tracking assets, e.g., PC, Monitor, Server, Storage;
- 10 • **Billing Code** - an identification code a partner assigns to an asset typically for accounting or budgeting purposes;
- **Order Date** - the date the asset was ordered,
- **Equipment Status** - the status of the asset, as described above;
- 15 • **N/U/B** - whether the asset is new, used or both. An asset can be both when the asset is new, but has a used option, or vice versa;
- **Ship Date** - the date the vendor shipped the asset;
- **Install Date** - the scheduled installation date of the asset;
- 20 • **Pool ID** - the pooling identification number the system assigns to an asset when the schedule of the asset is completed. The pooling ID identifies how the system will route an asset after the schedule of the asset is completed;
- 25 • **Hard Cost** - whether the asset is a hard or a soft cost. Typically, an asset is a hard cost, however, in some cases an asset is a soft cost, such as software not associated with a leased asset;
- 30 • **Leased-** the lease identification number of the asset;

- Tax Exempt - whether any part of the cost of the asset is tax exempt;
- Feature-1 - any information the system adds about the asset during the acquisition period. This field may be blank or display a brief description or short note about the asset. Once a schedule is activated, this field is blank;
- Lease - the lease identification number of the asset;
- Schedule - the schedule identification number of the asset;
- Feature-2 - any information the system adds about the asset during the acquisition period. This field may be blank or display a brief description or short note about the asset. Once a schedule is activated, this field is blank;
- Begin Date - the start date of the schedule the asset is attached to;
- End Date - the end date of the schedule the asset is attached to;
- Term - the term, in months, of the schedule the asset is attached to; and
- Remain - the months remaining of the term of the schedule the asset is attached to.

OPTION - Displays any options associated with the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 80 displays the following fields in a preferred embodiment, illustrated in FIG. 8:

- Quantity - the option quantity;
- Manufacturer - the name of the manufacturer of the option;

- Model Number - the manufacturer model number of the option;
- Description - a brief description of the option;
- Serial Number - the manufacturer serial number of the option;
- Tracking ID - the identification number a partner organization has assigned to the option to track its use in the partner's organization;
- List Price - the list price of the option. This field is not used in a preferred embodiment;
- Cost - the hard cost of the option;
- Maintenance Cost - the maintenance cost, to date, of the option; and
- Leased - whether the partner organization has leased the option.

LOCATION - Displays the installation and billing locations of the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 90 displays the following fields in a preferred embodiment, illustrated in FIG. 9:

- Company - the company name of the installation/billing location;
- Address, City, St., ZIP - the company address of the installation/billing location;
- County - the county of the installation/billing location.

CONTACTS - Displays the contacts of the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 100 displays the following fields in a preferred embodiment, illustrated in FIG. 10:

- Last Name - contact's last name;
- First Name - contact's first name;

- Title - contact's title; and
- Office, Ext. - contact's telephone number.

COST CENTER - Displays the cost centers of the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 110 displays the following fields in a preferred embodiment, illustrated in FIG. 11:

- Cost Center Type - the cost center type of the asset. In a preferred embodiment these are supplied by the system to enable partners to group cost centers by type. Available cost center types are Cost Center, Department, Mail Code, Region, Project, SSN, or Order Types;
- Cost Center Name - name of the cost center of the asset;
- Description - a brief description of the cost center;
- Distribution Percentage - the percentage of the cost of the asset charged to the cost center;
- Charge - the amount charged to the cost center, which is the distributed percentage of the total cost of the asset.

MAINTENANCE - Displays the warranty and maintenance information for the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 120 displays the following fields in a preferred embodiment, illustrated in FIG. 12:

- Warranty End Date - end date of the warranty of the asset;
- Warranty Letter Date - the date the partner organization received the warranty letter for the asset. In some cases, the warranty letter date is the effective date of the warranty for the asset;
- Warranty Period - the period of the warranty, which is the period from the warranty letter date to the warranty

end date;

- Maintenance Rent - the maintenance rent cost charged for the asset;
- Maintenance Cost - the total maintenance costs charged for the asset;
- Date - the date the maintenance was completed for the asset;
- Maintenance Description - a brief description of the maintenance completed; and
- Charge Amount - the amount charged for the completed maintenance.

INVOICE - Displays the invoice information for the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 130 displays the following fields in a preferred embodiment, illustrated in FIG. 13:

- Vendor - the vendor from which the asset or option was purchased;
- Invoice Number - the vendor invoice number;
- Date - the date of the invoice;
- Line Item - the invoice line item of the asset or option;
- Amount - the line item amount due for the asset or option; and
- Description - a brief description of the asset or option.

FINANCE - Displays the financial information for the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 140 displays the following fields in a preferred embodiment, illustrated in FIG. 14:

- Leased Item Cost - the lease cost of the asset;
- Leased Option Cost - the lease cost of any asset options;
- Leased Total Costs - the total lease cost of the asset

and its options;

- Maintenance/Administrative Cost - the maintenance and administrative cost of the asset included in the schedule. If none, the field is blank and the cost appears as a charge back amount;
- Installation Cost - the installation cost of the asset included in the schedule. If none, the field is blank and the cost appears as a charge back amount;
- Freight Cost - the freight cost of the asset included in the schedule. If none, the field is blank and the cost appears as a charge back amount;
- Software Cost - the software cost of the asset included in the schedule. If none, the field is blank and the cost appears as a charge back amount;
- Accessory Cost - the accessory cost of the asset included in the schedule. If none, the field is blank and the cost appears as a charge back amount;
- Total Soft Costs - the total of Maintenance/Administrative, Installation, Freight, Accessory costs. The soft costs are the costs associated with an asset that have been determined to have negligible value at the end of a lease;
- Item Rent-Hard - the rent charged for the asset and any options;
- Item Rent-Soft - the rent charged for any soft cost items associated with the asset;
- Monthly Item Rent - the monthly rent due for both the hard and soft rent items. If the monthly rent of the asset has been modified, a check mark appears in the checkbox next to the field;

- Monthly Maintenance Rent - the monthly maintenance rent charged for the asset;
- Total Rent - the total rent due, which is the sum of the monthly item and maintenance rent costs;
- 5 • Item List - the Leased Item Cost of the asset;
- Option List - the leased Option Cost of the asset;
- Total List - the total Leased Costs of the asset;
- Lessor's Basis - the sum of the total Leased Costs and Total Soft Costs of the asset;
- 10 • Lease Rate Factor-Hard - the lease rate factor calculated for the hard costs of the schedule of the selected asset;
- Lease Rate Factor-Soft - the lease rate factor calculated for the soft costs of the schedule of the selected asset;
- 15 • Payment Frequency - how often the lease payments for the schedule of the selected asset are due;
- Budget Number - the budget number assigned to the asset;
- Invoice Amount - the invoice amount of the asset;
- Charge Back Amount - the total charge back amount rebilled to a partner organization. The Charge back tab displays an itemized list of the charge backs.
- 20 • Begin Date - the date the schedule of the asset begins.
- Order Date - the date the partner organization received the asset. This date is prior to the start date of the schedule of the selected asset. Typically, this is the date the partner organization signed the Certificate of
- 25 Acceptance for the asset;
- Ordering Fee - the amount charged the partner organization for the asset from the order date to the begin date of the schedule. This amount is calculated by
- 30 multiplying the daily asset rent fee by the order days.

- Order Days - the number of days from the order date to the begin date of the schedule of the selected asset.
- LB Comp - one of four Lessor's Basis Computed codes. The LB Comp codes indicate how the Lessor's Basis was calculated for an asset; and
- Owned Op Cost - the total cost of any options owned by the partner organization for the selected asset.

CHARGE BACK - Displays the charge back information for the asset selected 61 in the bottom half 51 of the Asset Information Screen. This tab 150 displays the following fields in a preferred embodiment, illustrated in FIG. 15:

- Charge back Type - the charge back type code of the asset;
- G/L Account # - the General Ledger account the partner organization uses to process the charge back amount;
- Amount - the amount of the charge back item;
- Begin Date - for a one-time charge back amount, displays the date the system entered the charge back amount into the system database;
- End Date - the end date of the period for which the amount is charged. In a preferred embodiment of the present invention, this field is not used.

REPORTS

In the preferred embodiment, selecting the Reports from the main menu bar causes the display of the Reports Screen, illustrated in FIG. 3. The Reports Screen is the central screen of the Reports feature of the present invention, providing functionality which allows a user to produce a range of reports that enable a user to

retrieve data from the asset information database of the preferred embodiment of the present invention.

The Reports Screen comprises the Report feature 30, which is at the top of the screen in a preferred embodiment; options for producing and saving a report 31; and, the display area in the middle of the screen 32. In a preferred embodiment, the display area includes a link 33 to Adobe's Web site for downloading Acrobat Reader, free software that is required to view reports produced by the present invention.

Reports

The Reports feature of a preferred embodiment of the present invention provides a user with a range of asset information management reports, from the standard reports to any customized reports created for the partner's organization. The standard reports of a preferred embodiment include:

PURCHASE ORDER - allows an authorized user to view asset detail information organized by purchase order number, as illustrated in FIG. 17. The report is available in the Summary, Item Level, and Item Level with Options report formats. The report title 170 and the organization's master lease number 171 appear at the top of the report. The asset detail information listed includes the quantity 172, manufacturer 173, model 174, description 175, equipment cost 176, and quarterly lease payment 177 of each listed asset. The report also lists the total purchased asset; total equipment cost; total quarterly lease payment by purchase order; and, these totals for all selected purchase orders.

COST CENTER - allows an authorized user to view asset detail information organized by cost center, as illustrated in FIG. 18. The report is available in the Summary or Item Level formats. The

report title 180 and the organization's master lease number 181 appear at the top of the report. The asset detail information listed includes the quantity 182, manufacturer 183, model 184, description 185, equipment cost 186, management fee 187, and quarterly lease payment 188 for each listed asset. The report also lists the total items purchased, total equipment cost, total management fee, and total quarterly lease payment for each cost center, and these totals for all selected cost centers.

PURCHASING AGENT - allows an authorized user to view asset detail information organized by purchasing agent, as illustrated in FIG. 19. The report is available in the Summary or Item Level formats. The report title 190 and the organization's master lease number 191 appear at the top of the report. The asset detail information listed includes the quantity 192, purchase order number 193, cost center 194, order date 195, and equipment cost 196 for each listed asset. For each purchasing agent, the report lists asset detail by vendor. The report also lists the total items purchased and total equipment cost for each vendor, for each purchasing agent 197, and for all purchasing agents.

INSTALLATION - allows an authorized user to view asset detail information organized by installation location, as illustrated in FIG. 20. The report is available in the Summary or Item Level formats. The report title 200 and the organization's master lease number 201 appear at the top of the report. The asset detail information listed includes the quantity 202, manufacturer 203, model 204, description 205, equipment cost 206, and quarterly lease payment 207 for each listed asset. The report also lists the total items purchased 208, total equipment cost 209, and total quarterly lease payment 210 for each installation location 211, and these totals for all listed locations.

REBILL - allows an authorized user to view financial detail information for the charge back amounts of the selected schedule, as illustrated in FIG. 21. The report is available in the Summary or Group by Cost center report formats. The report title 2100, the organization's master lease number 211, and the term of the organization's lease 212 appear at the top of the report. For each cost center and purchase order combination, the report lists the charge back amounts - freight 213, software 214, warranty 215, installation 216, and accessory costs 217 - of the applicable assets; the total charge back amount 218, and the installation location 219 of the assets on the purchase order. The report also lists the total charge back amounts for the listed cost center and purchase order combinations, and the billing address of the listed purchase orders.

STATUS - allows an authorized user to view the status of an organization's master lease, as illustrated in FIG. 22. The report title 220, the organization's master lease number 221, and the term 222 of the organization's lease appear at the top of the report. For each purchase order the report lists the equipment cost 223, date of acceptance 224, ship date 225, order date 226, and whether the shipment was a partial shipment 227. In addition, the report lists totals 228: the total equipment cost; the total by equipment type; the total soft costs; and any remaining product costs of the organization's lease.

SOFT COSTS - allows an authorized user to view the soft costs of an organization's master lease, as illustrated in FIG. 23. Soft costs refer to the costs of a lease that have been determined to have a negligible value at the end of the lease. Soft costs include the maintenance, installation, freight, software, and accessory costs of the assets of a lease. The report title 230,

the organization's master lease number 231, and the term of the organization's lease 232 appear at the top of the report. For each cost center and purchase order combination, the report lists the soft costs 233, freight 234, software 235, and accessory costs 236 - of the applicable assets; the total soft costs 237, and the installation location 238 of the assets of each purchase order. The report also lists the total soft costs for the listed cost center and purchase order combinations, and the billing address of the listed purchase orders.

LEASE SUMMARY - allows an authorized user to view a summary of the selected schedule, as illustrated in FIG. 24. The report title 240, the organization's master lease number 241, the selected schedule 242, the schedule date 243, lease term 244, acceptance date 245, payment frequency 246, and lease end date 247 appear at the top of the report. The summary information listed includes the master lease, installation and billing location, and financial information of the selected

TERMINATION - allows an authorized user to view the assets of the schedules that end in the specified range of schedule end dates, as illustrated in FIG. 25. The report title 250, the organization's master lease number 251, and the specified schedule end date range 252 appear at the top of the report. For each asset of the selected schedules, the report lists the lease end date 253, manufacturer model number 254, description 255, manufacturer serial number 256, schedule item number 257, equipment cost 258 and lease payment 259.

Report Format Descriptions

In one preferred embodiment the Format drop-down menu in the Reports Screen enables a user to select the type of report to be

produced:

- Summary - this view lists identical assets once, with the quantity and amount fields for identical assets displaying the totals of the summarized assets;
- 5 • Item Level - this view lists each asset, including identical assets, separately;
- Item Level with Options - this view lists each asset, including identical assets and any asset options, separately;
- 10 • Standard - this is the format of the Status, Soft Costs, Lease Summary, and Termination reports, and one of the two formats available for the Rebill report; and
- Group by Cost Center - this is the second of two formats available for the Rebill report and lists rebilling information by cost center and purchase order number combination, with re billing subtotals listed for each cost center.
- 15

Producing a Report

20 In a preferred embodiment, an authorized user follows the same procedure for producing a report:

- Select the type of report from the Report drop-down menu;
- Select the format of the report from Format drop-down menu;
- 25 • Select the view of the report from the By drop-down menu;
- Select the other options presented from their drop-down menus; and
- Select Retrieve to produce the report.

30 After the report appears it can be viewed, saved to a file using the Save As options shown in FIG. 26, and printed.

* * *

Because many varying and different embodiments may be made within the scope of the inventive concepts herein taught, and because many modifications may be made in the embodiments herein detailed in accordance with the descriptive requirements of the law, it is to be understood that the details herein are to be interpreted as illustrative and not in a limiting sense. For example, in discussing Internet accessibility, this can be achieved in a variety of ways including wireless handheld devices, portable terminals, workstations, and any other devices or means which provides Internet access to the host for the system of the present invention.

We claim:

- 1 1. A system for asset information management, said system
2 comprising:
3 a host system;
4 first computer input-output means;
5 at least one asset database within said host system for
6 storing a plurality of asset information records and associated
7 business rules for asset information management; and
8 computer processing means within said host system for enabling
9 at least one of:
10 i. to look up said asset information records according to
11 - said associated business rules and
12 - search criteria provided by said first computer
13 input-output means, and
14 to control said first input-output means for output of
15 said looked up asset information records to at least one of a
16 display, hard copy device, and first file, and
17 ii. to select and format reports of said asset information
18 records according to
19 - said associated business rules and
20 - format and selection criteria provided by said
21 first computer input-output means, and
22 to control said first input-output means for output of
23 said selected and formatted asset information records to at
24 least one of a display, hard copy device, and file.
- 1 2. The system according to claim 1, further comprising means at
2 the host for specifying one of said looked up asset information
3 records for creation of detailed asset information sets containing

4 detailed asset information wherein each said set is associated with
5 at least one selectable element identifying the type of detailed
6 asset information said set contains so that any of looking up,
7 selecting and formatting reports by said computer processing means
8 is enabled with respect to each of said detailed asset information
9 sets by selecting said at least one selectable element.

1 3. The system according to claim 1, further comprising means at
2 the host for specifying one of said looked up asset information
3 records for creation of detailed asset information sets containing
4 detailed asset information wherein each said set is associated with
5 at least one selectable element identifying the type of detailed
6 asset information said set contains so that any of looking up,
7 selecting and formatting reports by said computer processing means
8 is enabled with respect to each of said detailed asset information
9 sets by selecting said at least one selectable element.

1 4. The system according to claim 1, wherein said first
2 computer input-output means comprises at least one legacy system.

1 5. The system according to claim 1, further comprising:
2 at least one remote communications facility;
3 communications network means associated with said host system,
4 said communications network means being controlled by said computer
5 processing means to exchange data between said host computer system
6 and said at least one remote communication facility;
7 second computer input-output means at said at least one remote
8 communications facility to enable at least one of:
9 i. - to provide search criteria to said computer
10 processing means for look up of said asset

- 11 information records,
- 12 - to output said looked up asset information records
- 13 to at least one of a remote display, hard copy
- 14 device, and file, and
- 15 - to download said host file of said looked up asset
- 16 information records,
- 17 ii. - to provide selection criteria and report format
- 18 specifications to said computer processing means
- 19 for selection of said asset information records ,
- 20 - to provide report format specifications to said
- 21 computer processing means for formatting said
- 22 selected asset information record,
- 23 - to output said formatted reports to at least one of
- 24 a display, hard copy device, and file, and
- 25 - to download said host file of said formatted
- 26 reports from host, and
- 27 iii. to upload to said host to be stored in said at least one
- 28 asset database, files of asset information records and
- 29 said associated business rules for the assets.

30 6. The system according to claim 5, wherein said data exchanged
 31 comprises search criteria, selection criteria, report formats,
 32 looked up data, formatted reports and files

1 7. The system according to claim 5, wherein:
 2 said at least one remote communications facility comprises a
 3 plurality of remote communications facilities associated with a
 4 plurality of supply chain partners;
 5 said host system comprises at least one centrally-located
 6 computer-based system; and

7 said at least one asset database comprises asset information
8 records and associated business rules for assets of each of said
9 plurality of supply chain partners,

10 such that said asset information records and associated
11 business rules for assets of each of said plurality of supply chain
12 partners can be uploaded and stored in said at least one asset
13 database and asset information records and associated business
14 rules stored in said at least one asset database can be looked up,
15 reported, and downloaded by each of said plurality of supply chain
16 partners using said plurality of remote communications facilities.

1 8. The system according to claim 5, wherein:

2 said host system and said at least one remote communications
3 facility exchange said data through the Internet.

4 9. The system according to claim 8, wherein said computer input-
5 output means employs a Web browser.

1 10. The system according to claim 5, further comprising means at
2 the host for specifying one of said looked up asset information
3 records for creation of detailed asset information sets containing
4 detailed asset information wherein each said set has an associated
5 tab identifying the type of detailed asset information said set
6 contains so that any of looking up, selecting and formatting
7 reports by said computer processing means is enabled with respect
8 to each of said detailed asset information sets.

1 11. The system according to claim 5, wherein said at least one
2 asset database comprises at least one relational asset database
3 having associated business rules, each said table having a

4 plurality of information fields for storage of asset information of
5 a prespecified type and each of said plurality of information
6 fields having associated business rules.

7 12. The system according to claim 5, wherein said first computer
8 input-output means and said second computer input-output means
9 comprises at least one legacy system.

10 13. The system according to claim 12, wherein:

11 said at least one remote communications facility comprises a
12 plurality of remote communications facilities associated with a
13 plurality of supply chain partners; and

14 said at least one asset database comprises asset information
15 records and associated business rules for assets of each of said
16 plurality of supply chain partners,

17 such that said asset information records and associated
18 business rules for assets of each of said plurality of supply chain
19 partners can be uploaded and stored in said at least one asset
20 database from at least said at least one legacy system and asset
21 information records and associated business rules stored in said at
22 least one asset database can be any of looked up, selected and
23 reported, and then downloaded to at least said at least one legacy
24 system by each of said plurality of supply chain partners using
25 said plurality of remote communications facilities.

1 14. A method for asset information management, said method
2 comprising the steps of:

3 providing a host system;

4 maintaining at least one asset database at the host of a
5 plurality of asset information records and associated business

6 rules;
7 providing at least one of search criteria and report selection
8 and formatting specifications;
9 when search criteria are provided, performing the steps of:
10 - looking up asset information records in the at least one
11 maintained asset database based on said provided search
12 criteria and said associated business rules;
13 - outputting said looked up asset information records to at
14 least one of a display, hard copy device and file;
15 when report selection and formatting specifications are
16 provided, performing the steps of:
17 - selecting asset information records in the at least one
18 maintained asset database based on said provided report
19 selection criteria and said associated business rules;
20 - formatting said selected asset information records
21 according to said provided report formatting
22 specifications;
23 - outputting said formatted reports to at least one of a
24 display, hard copy device, and file.

1 15. The method according to claim 14, wherein said at least one
2 maintained asset database is a relational asset database having
3 asset information and business rules stored in a plurality of
4 tables, each said plurality of tables having a plurality of
5 information fields for storage of asset information and business
6 rules of a prespecified type.

1 16. The method according to claim 15, further comprising the steps
2 of:
3 providing at least one remote communications facility;

4 providing communications network means connected to said host
5 and to said at least one remote communications facility;

6 providing search criteria received from said at least one
7 remote communications facility over said communications network
8 means;

9 providing report selection and formatting specifications
10 received from said at least one remote communications facility over
11 said communications network means;

12 transmitting said looked up asset information records over
13 said communications network means to said at least one remote
14 communications facility for output; and

15 transmitting said formatted reports over said communications
16 network means to said at least one remote communications facility
17 for output.

1 17. The method according to claim 16, wherein said communications
2 network means is the Internet.

3 18. The method according to claim 17, wherein said at least one
4 remote communications facility employs a Web browser.

1 19. The method according to claim 16, further comprising the
2 steps of:

3 providing a plurality of said at least one remote
4 communications facility for access by a plurality of supply chain
5 partners; and

6 maintaining in said at least one asset database at said host
7 a plurality of asset information records and associated business
8 rules for assets of each of said plurality of supply chain
partners.

1 20. The method according to claim 16, further comprising the steps
2 of:

3 providing at least one legacy system having a plurality of
4 legacy asset information records and associated business rules at
5 said at least one remote communications facility;

6 uploading at least one of said plurality of legacy asset
7 information records and associated business rules from said at
8 least one legacy system to said maintained at least one asset
9 database over said communications network; and

10 downloading at least one of said plurality of asset
11 information and associated business rules of said maintained at
12 least one asset database to said at least one legacy system over
said communications network.

1 21. The method according to claim 20, wherein said at least one
2 legacy system comprises at least a plurality of supply chain
3 partner systems.

4 22. The method according to claim 21, wherein said communications
5 network means is the Internet.

6 23. The method according to claim 22, wherein said at least one
7 remote communications facility employs a Web browser.

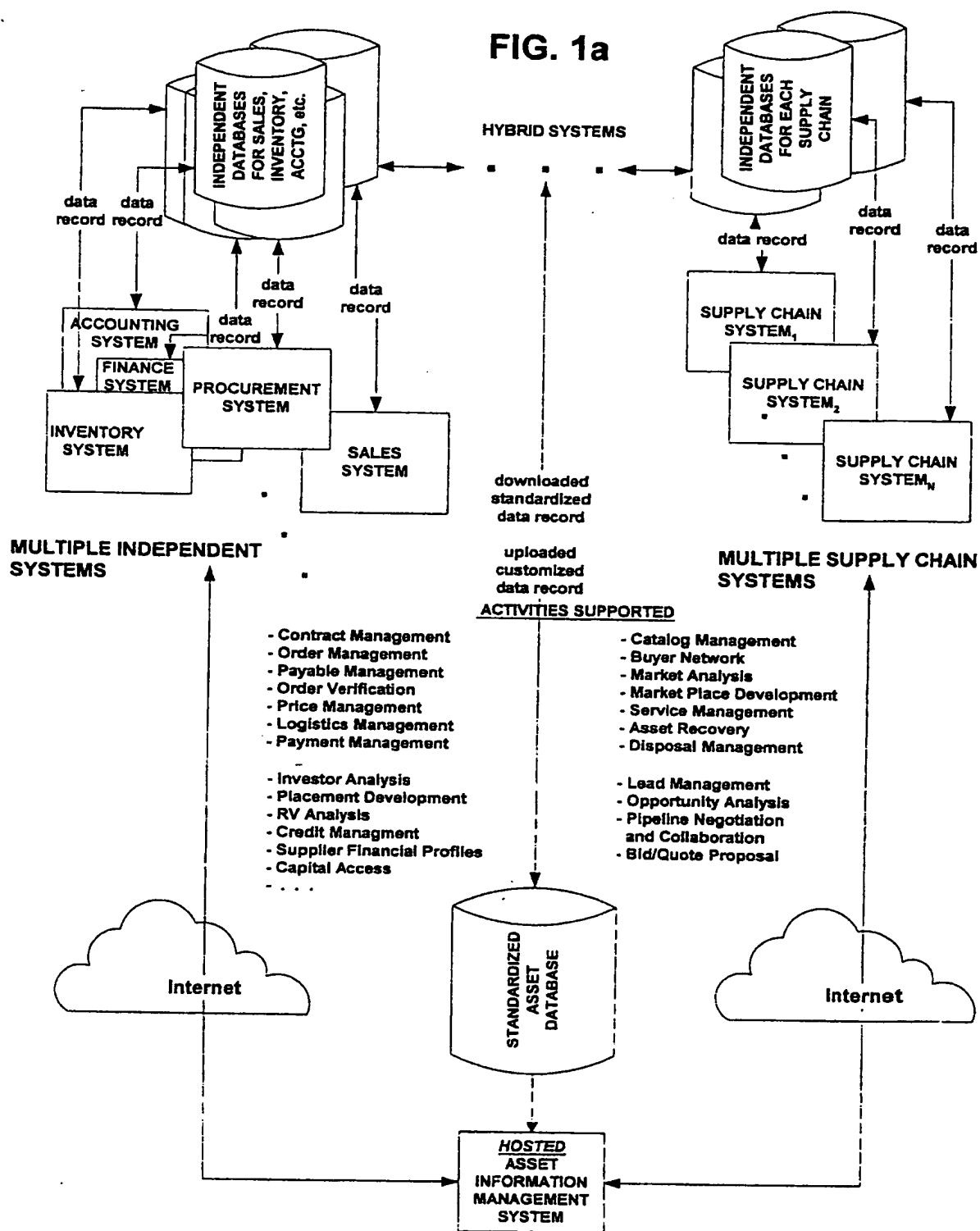


FIG. 1b

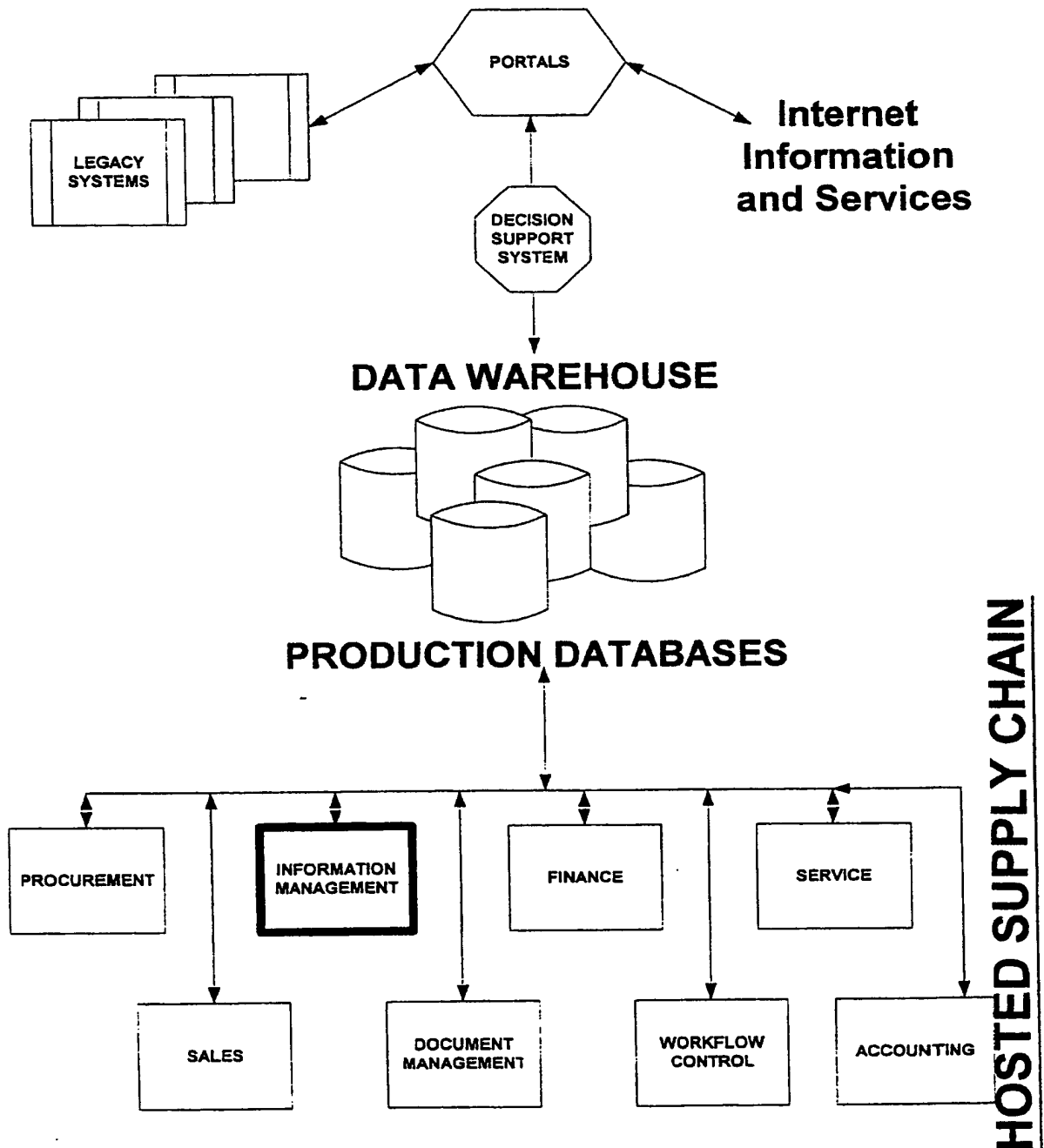


FIG. 2

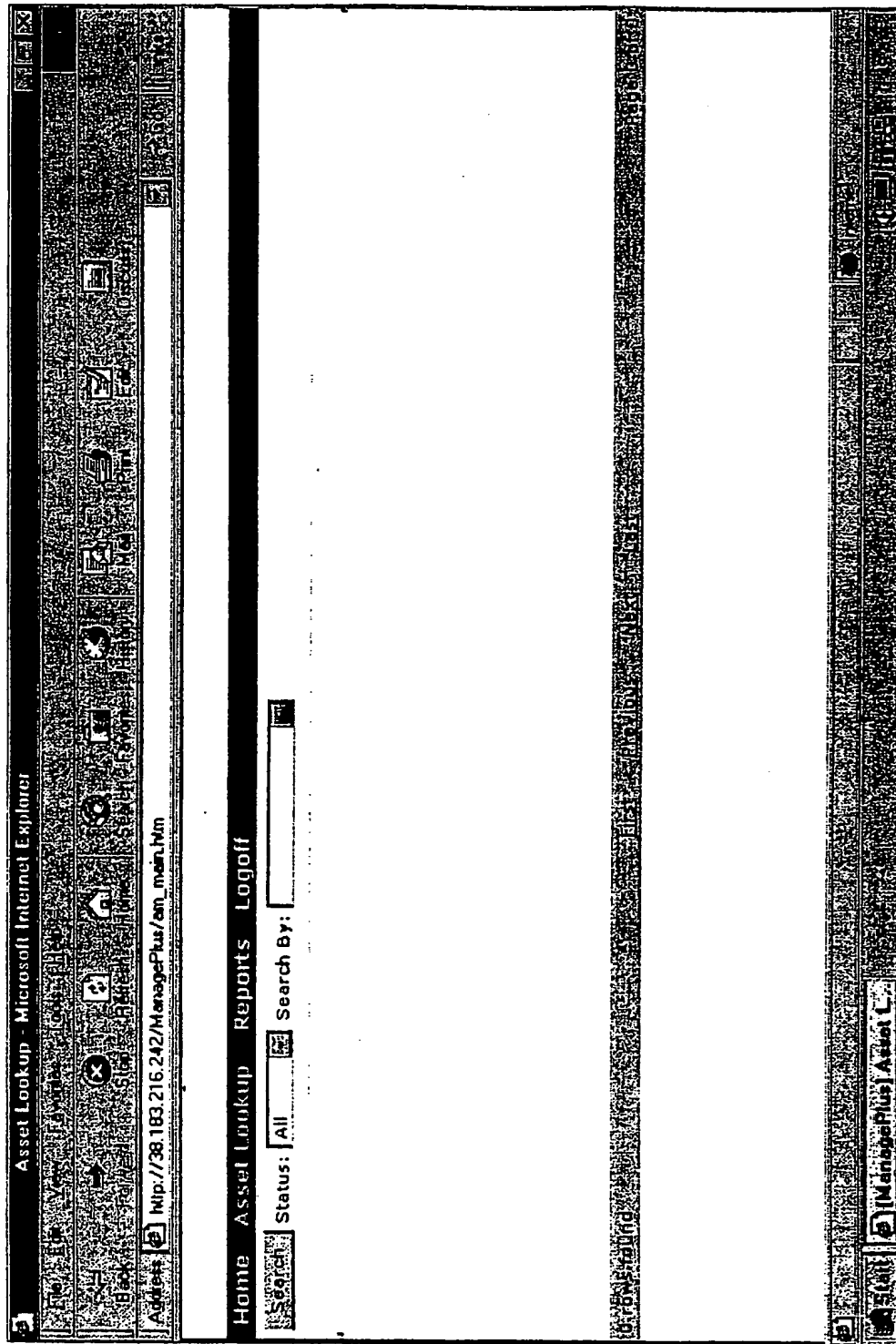


FIG. 3

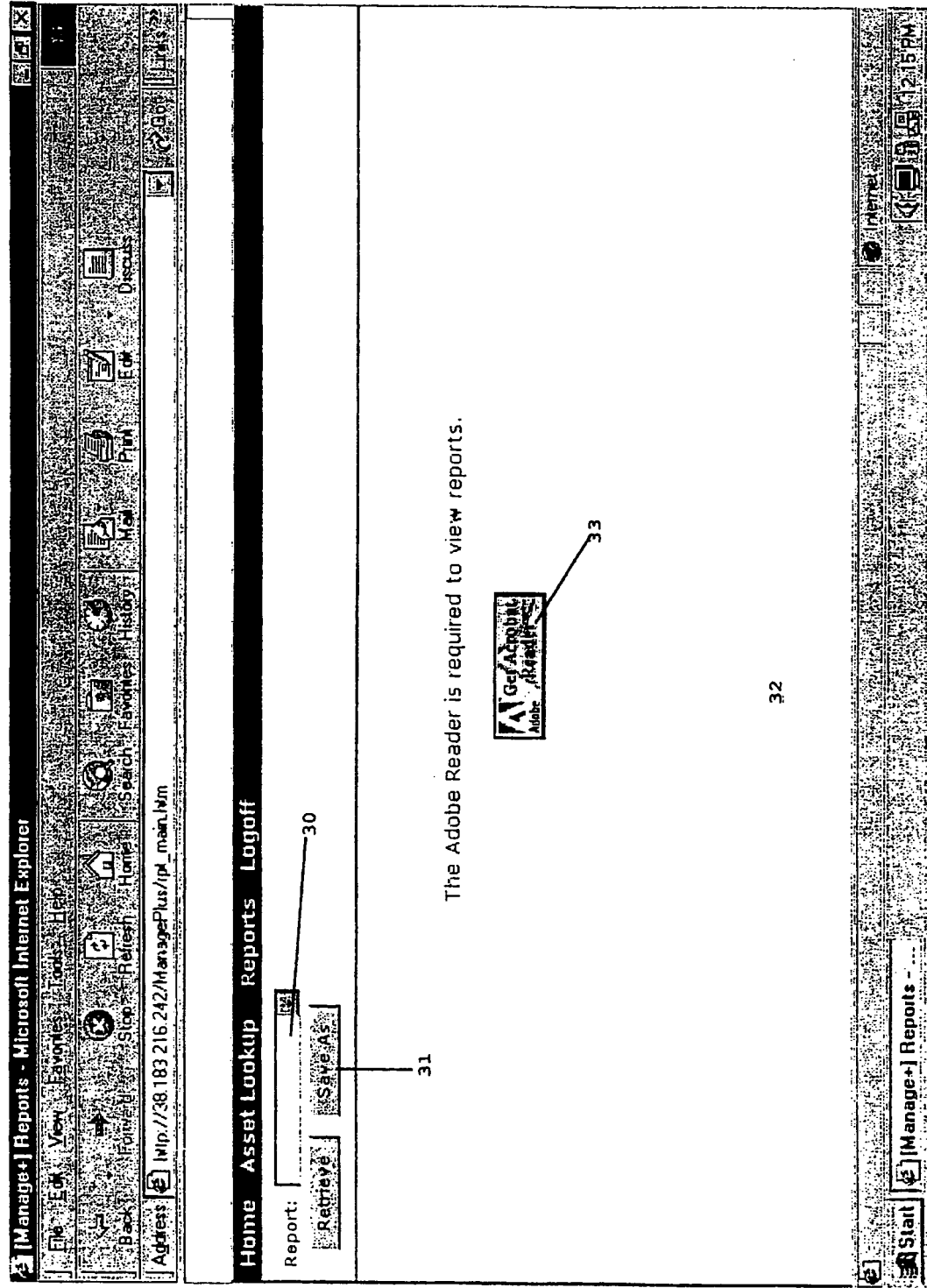


FIG. 4

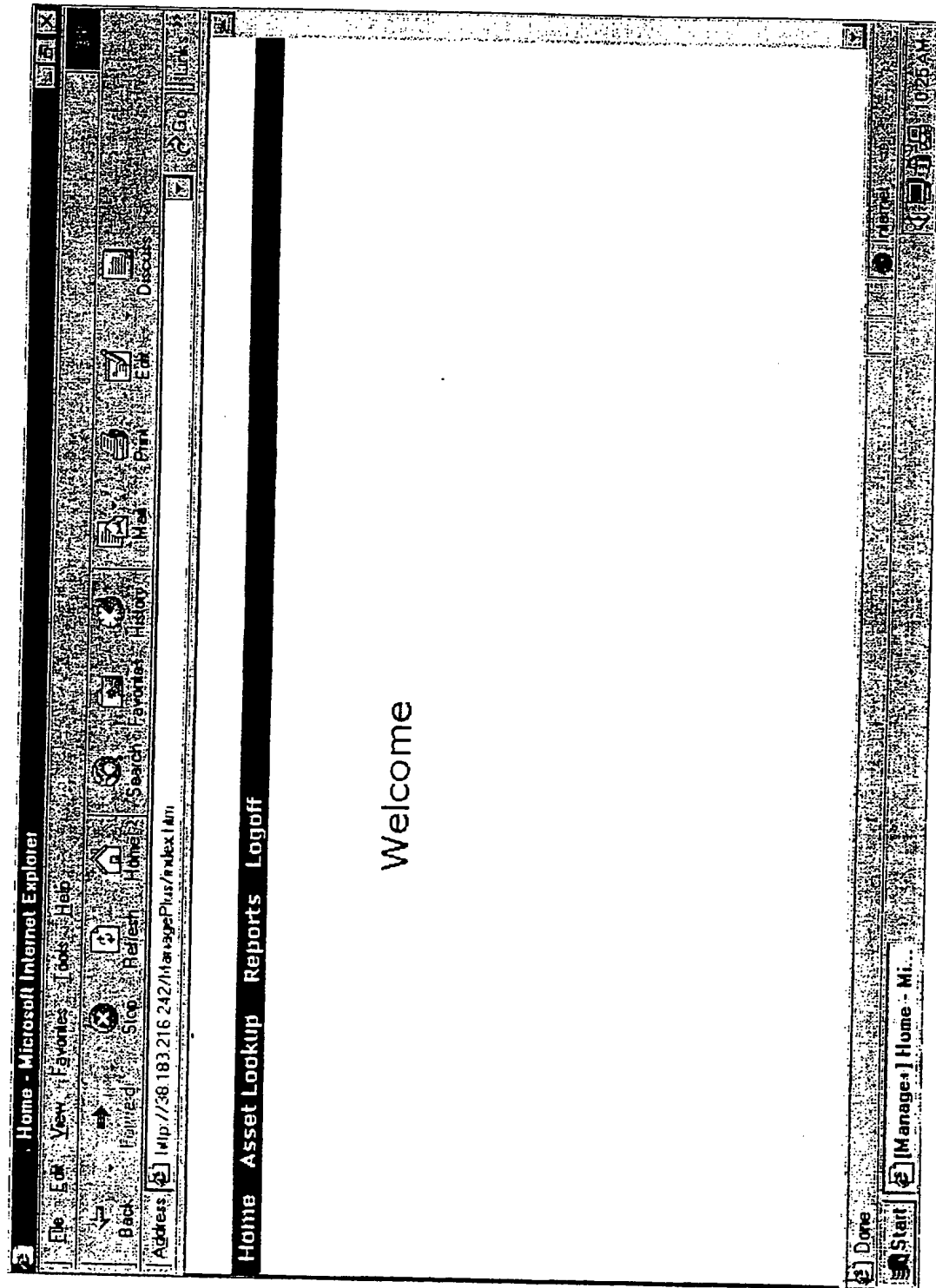
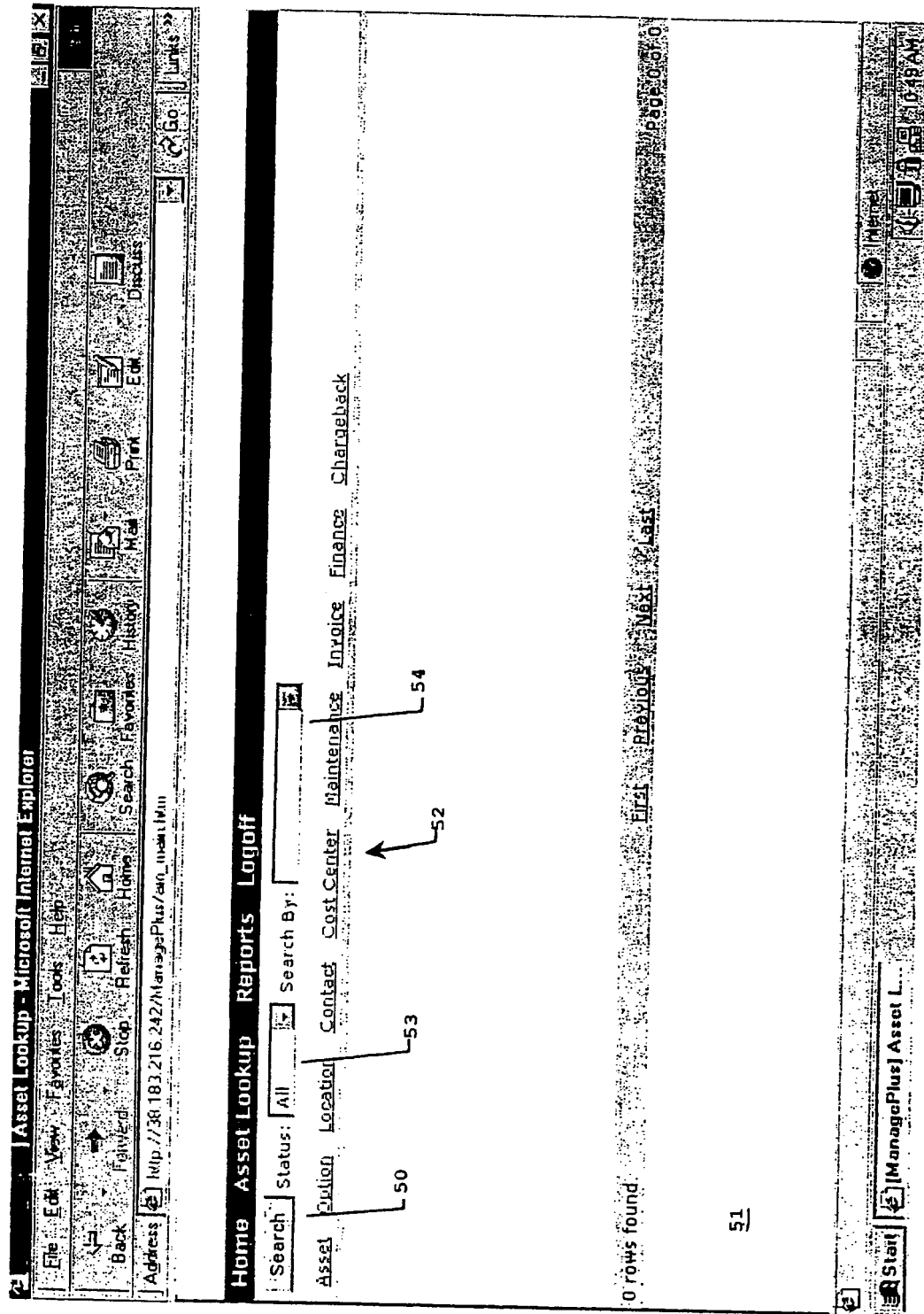


FIG. 5



9. FIG.

The screenshot shows the Microsoft Internet Explorer browser window. The title bar reads "Asset Lookup - Microsoft Internet Explorer". The address bar shows "http://30.183.216.742/MessagePlus/am_main.htm". The main content area displays the "Asset Lookup" page with a table of assets. The table has columns for "Asset ID", "Asset Name", "Asset Type", "Asset Location", "Asset Status", and "Asset Date". The table contains several rows of data, including assets like "Asset 1", "Asset 2", "Asset 3", "Asset 4", "Asset 5", "Asset 6", "Asset 7", "Asset 8", "Asset 9", "Asset 10", "Asset 11", "Asset 12", "Asset 13", "Asset 14", "Asset 15", "Asset 16", "Asset 17", "Asset 18", "Asset 19", "Asset 20", "Asset 21", "Asset 22", "Asset 23", "Asset 24", "Asset 25", "Asset 26", "Asset 27", "Asset 28", "Asset 29", "Asset 30", "Asset 31", "Asset 32", "Asset 33", "Asset 34", "Asset 35", "Asset 36", "Asset 37", "Asset 38", "Asset 39", "Asset 40", "Asset 41", "Asset 42", "Asset 43", "Asset 44", "Asset 45", "Asset 46", "Asset 47", "Asset 48", "Asset 49", "Asset 50", "Asset 51", "Asset 52", "Asset 53", "Asset 54", "Asset 55", "Asset 56", "Asset 57", "Asset 58", "Asset 59", "Asset 60", "Asset 61", "Asset 62", "Asset 63", "Asset 64", "Asset 65", "Asset 66", "Asset 67", "Asset 68", "Asset 69", "Asset 70", "Asset 71", "Asset 72", "Asset 73", "Asset 74", "Asset 75", "Asset 76", "Asset 77", "Asset 78", "Asset 79", "Asset 80", "Asset 81", "Asset 82", "Asset 83", "Asset 84", "Asset 85", "Asset 86", "Asset 87", "Asset 88", "Asset 89", "Asset 90", "Asset 91", "Asset 92", "Asset 93", "Asset 94", "Asset 95", "Asset 96", "Asset 97", "Asset 98", "Asset 99", "Asset 100".

[Home](#)
[Asset Lookup](#)
[Reports](#)
[Logoff](#)

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO DEMO+ DEMO+

60

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ou
<u>Details</u>	EPLUS	DEMO	220-3288			
<u>Details</u>	EPLUS	DEMO	220-3085		YSR1X	☐
<u>Details</u>	EPLUS	DEMO	320-G361	79370690	YSR6T	☐
<u>Details</u>	EPLUS	DEMO	P780 MONITOR 17"	79370631	400J31Y1DC	☐
<u>Details</u>	EPLUS	DEMO	P780 MONITOR 17"	79370682	49883UH1Y3X	☐
<u>Details</u>	EPLUS	DEMO	D/950C	79370683	LIS1457HG52B	☐
<u>Details</u>	EPLUS	DEMO	VECTRA VL18 M1400MHZ			

Page 1 of 1

51

Done

Start

ManagePlus Asset L

11/27 AM

FIG. 7

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Print Edit Discuss

Address http://38.183.216.242/ManagePlus/asp_main.htm

Home 70 **Lookup Reports Logout**

Search All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MANAGER DEMO

Asset Options Location Contact Cost Center Maintenance Invoice Finance Chargeback

Serial Number: YSRUX Tracking Number: 79970679 Purchase Order: (703)-31676521

Manufacturer: DELL Model Number: Z20-3286 Vendor: EPLUS TECHNOLOGY OF

Description: LATITUDE CPER400GT400MHZ Category: Laptop

Billing Code: 350-0117 Order Date: 10/4/1999 Equipment Status: Active Pool ID:

MOB: New Ship Date: 11/19/1999 Install Date: 11/24/1999 Feature-1:

Hard Cost: ☒ Leased: ☒ Tax Exempt: ☐ Feature-2:

Lease: EPLUS Schedule: DEMO Term: 39 Remain: 34

Begin Date: 12/01/1999 End Date: 03/01/2003

19/04/04

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
EPLUS	DEMO	220-3286	LATITUDE CPER400GT400MHZ	79970679	YSRUX	☐
EPLUS	DEMO	220-3085	POWEREDGE 6300 WITH REDUNDANT	79970680	YSR6T	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	48883TY1DC	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	48883LHY3X	☐
EPLUS	DEMO	U795CE	VECTRA VL8 M400MHZ	79970683	US1457HGY78	☐

Done Start ManagePlus Asset L...

Page 1 of 4

FIG. 8

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

Address http://38.18.216.242/ManagePlus/main.htm

Home Asset Lookup Reports Logoff

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MAINTAGE+ DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Qty	Manufacturer	Model Number	Description	Serial Num	Tracking ID	List Price	Cost	Maint Cost	Leased
1	DELL	HDD-10	HARD DRIVE 10GB			0.00	0.00	0.00	☒
1	DELL	RAM-128	RAM 128MB			0.00	0.00	0.00	☒
1	DELL	CDROM-24	CDROM DRIVE 24X			0.00	0.00	0.00	☒
1	MACROSOFT	WINDOWS NT	WINDOWS NT V4.0			0.00	0.00	0.00	☒
1			C-PORT MONITOR			0.00	0.00	0.00	☐

19 of 61

Lease Schedule Model Description Tracking # Serial Rent Ov

EPLUS	DEMO	220-3285	LATITUDE CMT44UG14UM#1Z	79370679	YSRUX	☐
EPLUS	DEMO	220-3085	POWEREDGE 6300 WITH REDUNDANT	79970680	YSRBT	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	499931Y1DC	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	499931Y1DC	☐
EPLUS	DEMO	D7850E	VECTRA VL18 P1400#1Z	79970683	US1457HGY78	☐

51

Done Start [ManagePlus] Asset L...

Internet

11:32 AM

FIG. 9

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mod Print Edit Discuss

Address http://38.183.216.242/ManagePlus/asn_main.htm

90

Home Asset Lookup

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MANAGE+ DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Install

Company EPLUS GROUP INC
Address 400 HERNDON PARKWAY
City St Zip HERNDON VA 20170
County FAIRFAX

Billing

Company EPLUS GROUP INC
Address 400 HERNDON PARKWAY
City St Zip HERNDON VA 20170
County FAIRFAX

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Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
Details	DEMO	220-32863	LATITUDE CTR4003740UM#12	79370679	YSRUX	☐
Details	DEMO	220-3095	POWEREDGE 6300 WITH REDUNDANT	79370680	YSRST	☐
Details	DEMO	320-6367	P780 MONITOR 17"	79370681	49833TY1DC	☐
Details	DEMO	320-6367	P780 MONITOR 17"	79370682	49833LFTY3X	☐
Details	DEMO	D795UE	VECTRA VL18 PL400M#12	79370683	US1457HGY78	☐

51

Start [ManagePlus] Asset L...

Date

Internet

1:53 AM

FIG. 10

Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss Links
Address http://10.183.216.242/ManagePlus/asset_lookup.htm

Home Asset Lookup Report
Search: Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MANAGE+ DEMO
Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Install
Last Name: MANAGEMENT
First Name: ASSET
Title: LEASING GROUP
Office: (703)810-2593 Ext:

Billing
Last Name: BARTON
First Name: MANDY L.
Title: VICE PRESIDENT OF CRM
Office: (703)709-1951 Ext:

19 rows 61

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
EPLUS	DEMO	220-3285	LATITUDE CTR4003 (400MHz)	79970679	YSRDX	☐
EPLUS	DEMO	220-3085	POWEREDGE 6300 WITH REDUNDANT	79970680	YSR6T	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	498831Y1DC	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	498831HY3X	☐
EPLUS	DEMO	17950E	VECTRA VL8 P4400MHz	79970683	US1457HGY78	☐

Done Start [ManagePlus] Asset L... Internet 11:57 AM

FIG. 11

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

Address http://38.183.216.242/ManagePlus/an_main.htm

110

Home Asset Lookup Reports Logout

Search: Status: All Search By: Lease Sched Lease: EPLUS Schedule: DEMO - MAINTAGE+ DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Cost Ctr Type	Cost Ctr Name	Description	Dist %	Charge
Department A	ASSET MANAGEMENT		50%	0.00
Cost Center	0002		50%	0.00

61

19:50:15 11/19/01

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
Details EPLUS	DEMO	220-3286	LATITUDE CPT400GT400#1Z	79970678	YSRX	☐
Details EPLUS	DEMO	220-3085	POMEREDOE 6300 WITH REDUNDANT	79970680	YSR6T	☐
Details EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	49833TY1DC	☐
Details EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	49833JHY3X	☐
Details EPLUS	DEMO	D7950E	VECTRA VL80 PL400#1Z	79970683	IS1457HG78	☐

Page 1 of 4

Done Start ManagePlus Asset L

11/19/01 11:59 AM

FIG. 12

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

Address http://38.183.216.242/ManagePlus/aen_main.htm

120

Home Asset Lookup Reports Logout

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MAHAGE+ DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Warranty End Date: Warranty Letter Date: Warranty Period: 0

Maint Rent: 0.00 Maint Cost: 0.00

Date	Maintenance Description	Charge Amount
03/20/2000	HARD DRIVE REPLACEMENT	65.00

61

19 rows

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
Details	EPLUS	220-3286	LATITUDE CRR400GT400MHZ	79370679	YSRX	☐
Details	EPLUS	220-3035	POWEREDGE 6300 WITH REDUNDANT	79370680	YSRGT	☐
Details	EPLUS	320-6367	P780 MONITOR 17"	79370681	49883TY1DC	☐
Details	EPLUS	320-6367	P780 MONITOR 17"	79370682	49883UHY3X	☐
Details	EPLUS	D7950E	VECTRA VL18 PLUS 100MHZ	79370683	US1457HGY78	☐

Page 1 of 4

Done

Start [ManagePlus] Asset L

12:01 PM

FIG. 13

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss

Address http://38.183.216.242/ManagePlus/am_main.htm

Home Asset Lookup Reports Logout

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MANAGE + DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Vendor	Invoice Number	Date	Line Item	Amount	Description
EPLUS TECHNOLOGY OF VA INC	232022854	11/20/1999	1	4,127.59	

61

19 Rows found

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ov
Details EPLUS	DEMO	220-3286	LATITUDE CPM400GT400MHZ	79970679	YSRUX	☐
Details EPLUS	DEMO	220-3035	POWEREDGE 6300 WITH REDUNDANT	79970680	YSR61	☐
Details EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	49883TY1DC	☐
Details EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	49883JHY3X	☐
Details EPLUS	DEMO	D7950E	VECTRA VL18 PL4000MHZ	79970683	US1457HGY78	☐

51

Done Start ManagePlus Asset L...

Page 1 of 4

12:03 PM

FIG. 14

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print EOL Discuss Links

Address: http://30.183.216.242/ManagePlus/am_main.htm

140

Home Asset Lookup Reports Logout

Search: Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MAHAGE + DEMO

Asset Option Location Contact Cost Center Maintenance Invoice Finance Chargeback

Leased Item Cost:	19,920.00	Item Rent - Hard:	3,467.49	Invoice Amt:	0.00
Leased Opt Cost:	104,960.00	Item Rent - Soft:	0.00	Charge Back Amt:	0.00
Leased Total Cost:	124,880.00	Mnth Item Rent:	3,467.50	Begin Date:	09/01/1997
Maint/Admin Cost:	0.00	Mnth Maint Rent:	0.00	Order Date:	06/27/1997
Install Cost:	0.00	Total Rent:	3,467.50	Ordering Fee:	577.92
Freight Cost:	0.00	Item List:	19,920.00	Order Days:	5
Software Cost:	0.00	Option List:	104,960.00	LD Comp:	Manual
Accessory Cost:	0.00	Total List:	124,880.00	Owned Opt Cost:	0.00
Total Soft Cost:	0.00				

Payment Frequency: Quarterly Budget Number:

Tracking #

Lease	Schedule	Model	Description	Serial	Rent Ov
Details 1011	1	CISCO7513	CISCO 7513 CHASSIS	73009395	☒
Details 1011	1	WS-C5000	CATALYST 5000 CHASSIS	66052809	☐
Details 1011	1	WS-C1900	CATALYST 1900 SWITCH	WSC1900PS6021650	☐
Details 1011	1	WS-C1900	CATALYST 1900 SWITCH	WSC1900PS6021672	☐
Details 1011	1	WS-C1900	CATALYST 1900 SWITCH	WSC1900PS6021684	☐

12 rows 61

First Previous Next Last Page 1 of 3

Done Start ManagePlus Asset L... Internet 12:06 PM

FIG. 15

Asset Lookup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discards

Address: http://36.183.216.242/ManagePlus/am_main.htm

Home Asset Lookup Reports Logout

Search Status: All Search By: Lease/Sched Lease: EPLUS Schedule: DEMO - MANAGE+ DEMO

Asset Location Contact Cost Center Maintenance Invoice Finance Chargeback

Chargeback Type	GA Acct #	Amount	Begin Dt	End Dt
Account for Freight	FREIGHT REBILL	55.00	02/14/2000	
Account for Install	INSTALL REBILL	200.00	02/16/2000	

61

Lease	Schedule	Model	Description	Tracking #	Serial	Rent Ou
EPLUS	DEMO	220-3286	LA TITLIDE CPER4000141UUMHZ	79970679	YSRX	☐
EPLUS	DEMO	220-3035	PCNEREDGE 6300 WITH REDUNDANT	79970680	YSR6T	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970681	493331Y1DC	☐
EPLUS	DEMO	320-6367	P780 MONITOR 17"	79970682	49983LHY3X	☐
EPLUS	DEMO	D7950E	VECTRA VL18 PL400MHZ	79970683	US1457HG78	☐

Done Stat [ManagePlus] Asset L...

Page 1 of 4

12:08 PM

FIG. 16

FOR A MASTER LEASE:

- . PURCHASE ORDER
- . COST CENTER
- . PURCHASING AGENT
- . INSTALLATION-BY LOC
- . REBILL
- . STATUS
- . SOFT COST
- . LEASESUMMARY
- . TERMINATED

FIG. 17

Adobe Acrobat - [Purchase Order Report.pdf]

Date : 05/11/2000
Time : 12:49 PM

EPLUS INC
Purchase Order Summary Report

172 173 174 175 176 177

Qty Manufacturer Model Description Equipment Cost Monthly Lease Payment

Purchase Order: (709)-31676521

2 DELL 220-3286 LATITUDE CPIR400GT400MHZ \$4,077.58 \$158.17
1 UNKNOWN L-MAINTENANCE ONE YEAR LAWN MAINTENANCE \$1,160.00 \$0.00
3 Items for Purchase Order (709)-31676521 \$5,237.58 \$158.17

Purchase Order: (727)-26587226

2 DELL 220-3085 POWEREDGE 0300 WITH REDUNDANT POWER \$15,174.88 \$588.91
2 Items for Purchase Order (727)-26587226 \$15,174.88 \$588.91

Purchase Order: (749)-31905608

2 DELL 320-6367 P780 MONITOR 17" \$325.00 \$12.61
2 Items for Purchase Order (749)-31905608 \$325.00 \$12.61

Purchase Order: (755)-31905608

2 DELL 320-6367 P780 MONITOR 17" \$325.00 \$12.61
2 Items for Purchase Order (755)-31905608 \$325.00 \$12.61

Purchase Order: 234-000129

2 HP D7950E VECTRA VL18 PIII400MHZ \$2,082.47 \$81.63
2 Items for Purchase Order 234-000129 \$2,082.47 \$81.63

Purchase Order: 234-000185

2 HP D2838A M700 COLOR MONITOR 17" \$398.95 \$15.48
2 Items for Purchase Order 234-000185 \$398.95 \$15.48

124% 1 of 2 85 x 11 in 100%

FIG. 18

Adobe Acrobat - [Cost Center Report.pdf]

File Edit Document Tools View Window Help

Date: 05/15/2000 Time: 1:49 PM

Page 4 of 4

Cost Center Summary Report

Lease EPLUS

182 183 184 185 186 187 188

Qty Manufacturer Model Description Equipment Cost Management Fee Monthly Lease Payment

Cost Center: 0002

1	ZEBRA TECH	5506UK06409	WAX/RESIN 6580 SERIES 2.52X360"	\$0.00	\$0.00	\$0.00
1	ZEBRA TECH	70940BLUE	POLYTRANS 3000 2"x1" LABEL (BLUE)	\$0.00	\$0.00	\$0.00
1	ZEBRA TECH	70940GREEN	POLYTRANS 3000 2"x1" LABEL (GREEN)	\$0.00	\$0.00	\$0.00
1	ZEBRA TECH	70940PINK	POLYTRANS 3000 2"x1" LABEL (PINK)	\$0.00	\$0.00	\$0.00
1	ZEBRA TECH	70940YELLOW	POLYTRANS 3000 2"x1" LABEL (YELLOW)	\$0.00	\$0.00	\$0.00
1	ZEBRA TECH	1453-241-00000	1-402 STANDARD THERMAL TRANSFER	\$0.00	\$0.00	\$0.00
6	Items for Cost Center					

Cost Center: 0002

1	DELL	220-3286	LATITUDE CPIR400G1/400MHZ	\$2,038.79	\$0.00	\$79.09
1	HP	12830A	M700 COLOR MONITOR 17"	\$199.48	\$0.00	\$7.74
1	HP	07950E	VECTRA VL18 PII/400MHZ	\$1,041.24	\$0.00	\$40.82
1	OSI/IBA	PAS403U-12CN4	SATELLITE 4030COT P6/300MHZ	\$1,133.14	\$0.00	\$44.23
4	Items for Cost Center 0002					

Cost Center: 0004

1	DELL	220-3085	POWEREDGE 6300 WITH REDUNDANT	\$7,587.44	\$0.00	\$294.40
2	DELL	320-6387	POWEREDGE 6300 WITH REDUNDANT	\$325.00	\$0.00	\$12.61
3	Items for Cost Center 0004					

Cost Center: 0005

3	Items for Cost Center 0005					
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FIG. 19

Adobe Acrobat - [PurchasingAgentReport.pdf]

File Edit Document Tools View Window Help

Date : 08/25/2000
Time : 1:09 PM

Page 196

Purchasing Agent Summary Report

Lease EPI inc 190

191 Purchase Order 193

194 Cost Center

195 Order Date

Equipment Cost

Qty

Purchasing Agent: MIKE DANIELS
(703) 810-2586

Vendor: EPLUS TECHNOLOGY OF VA INC

Qty	Item	Order Date	Equipment Cost
1	234-000129	09/10/1999	\$1,041.23
1	234-000129	09/10/1999	\$1,041.23
1	234-000185	11/02/1999	\$188.48
1	234-000185	11/02/1999	\$199.48
4	Items for Vendor		\$2,481.42
4	Items for Purchasing Agent		\$2,481.42

Purchasing Agent: TATIANA MUNDALUCA
(703) 709-1943

Vendor: EPLUS TECHNOLOGY OF VA INC

Qty	Item	Order Date	Equipment Cost
1	34422	09/25/1999	\$8,076.50
1	34422	09/25/1999	\$0,076.50
1	38 183 216.35	09/29/1999	\$868.00
3	Items for Vendor		\$13,021.00
3	Items for Purchasing Agent		\$13,021.00

Purchasing Agent: RENEE SLATER, PROJECT MANAGER
(703) 810-2593

Vendor: EPLUS TECHNOLOGY OF VA INC

Qty	Item	Order Date	Equipment Cost
1	(709)-31676521	10/14/1999	\$637.50
1	(727)-26587226	10/27/1999	\$7,587.44
1	(727)-26587226	10/27/1999	\$7,587.44

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FIG. 20

Adobe Acrobat - [Installation Report.pdf]

File Edit Document Tools View Window Help

Date : 05/15/2000
Time : 2:00 PM

Page 1 of 1

EPLUS INC
Installation Summary Report

202 203 204 205 206 207 208 209 210 211

Qty Manufacturer Model Description Equipment Cost Monthly Lease Payment

Install Location:

1	ZEBRA TECH	55863K06409	WAXRESIN 5586 SERIES 2.52X360"	\$0.00	\$0.00
1	ZEBRA TECH	70940BLUE	POLYTRANS 3000 2"X1" LABEL (BLUE)	\$0.00	\$0.00
1	ZEBRA TECH	70940GREEN	POLYTRANS 3000 2"X1" LABEL (GREEN)	\$0.00	\$0.00
1	ZEBRA TECH	70940PINK	POLYTRANS 3000 2"X1" LABEL (PINK)	\$0.00	\$0.00
1	ZEBRA TECH	70940YELLOW	POLYTRANS 3000 2"X1" LABEL (YELLOW)	\$0.00	\$0.00
1	ZEBRA TECH	1453-241	1-402 STANDARD THERMAL TRANSFER PRINTER	\$0.00	\$0.00
6	Hems for install location			\$0.00	\$0.00

Install Location: EPLUS GROUP INC
400 HERNDON PARKWAY
HERNDON, VA 20170

2	DELL	220-3085	POWEREDGE 6300 WITH REDUNDANT POWER	\$15,174.88	\$588.91
2	DELL	220-3286	LATITUDE C/P140XG1/400MHZ	\$4,077.58	\$158.17
4	DELL	320-6367	P780 MONITOR 17"	\$650.00	\$25.22
1	HP	C4111A	LASERJET 5000N PRINTER	\$868.00	\$33.67
2	HP	D2830A	M700 COLOR MONITOR 17"	\$398.95	\$15.48
2	HP	17034AAAD	NETSERVER L113R PII/450MHZ MODEL 1 RACK	\$12,153.00	\$472.25
2	HP	D7950E	VECTRA VL18 PII/400MHZ	\$2,082.47	\$81.03
1	IBM	8287WLT	PC 300UL MICROTOWER PII/400MHZ	\$1,208.00	\$50.39

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FIG. 22

Adobe Acrobat - [Status Report.pdf]
 File Edit Document Tools View Window Help

Date: 5/17/00 Time: 14:06:02

Page 1 of 1

221 EPLUS INC 220 Status Report 222
 Lease EPLUS-DEMO Term 12/01/1999 - 03/01/2003

PO #	Equipment Cost	Date Of Acceptance	Ship Date	Order Date	Partial Shipment
709)-31876521	223 \$5,237	224 11/29/1999	225 11/29/1999	226 11/29/1999	228
727)-20507226	\$15,174	11/29/1999	11/29/1999	11/29/1999	
749)-31815608	\$325.00	11/29/1999	11/29/1999	11/29/1999	
755)-31905608	\$325.00	11/29/1999	11/29/1999	11/29/1999	
234-080120	\$2,082.47	09/25/1999	09/25/1999	09/25/1999	
234-080185	\$398.97	11/29/1999	11/29/1999	11/29/1999	
34240	\$91,722.90	10/09/1999	10/09/1999	10/09/1999	
14422	\$12,153.00	10/09/1999	10/09/1999	10/09/1999	
100 183,210.35	\$868.00	10/15/1999	10/15/1999	10/15/1999	
3001177.1	\$2,268.27	10/02/1999	10/02/1999	10/02/1999	
3001177.1	\$11,973.00	10/15/1999	10/15/1999	10/15/1999	
3001119.1	\$1,299.00	11/05/1999	11/05/1999	11/05/1999	
VAC159-12	\$71,778.65	10/15/1999	10/15/1999	10/15/1999	
VAC159-12	\$70,028.73	10/15/1999	10/15/1999	10/15/1999	
VAC159-12	\$875.00	10/20/1999	10/20/1999	10/20/1999	
VAC159-12	\$734.00	10/26/1999	10/26/1999	10/26/1999	
VAC159-12	\$71,008.65	11/05/1999	11/05/1999	11/05/1999	
VAC159-12	\$1,333.00	11/08/1999	11/08/1999	11/08/1999	

229

Lease EPLUS-DEMO	Total:	Total PC's:
Total Laptops:	2	2
Total Monitors:	3	1
Total Soft Cost:	\$310.00	4
		7
		\$210,718.03

115N 1 of 1 8.5 x 11 in.

Gowling Lafleur Henderson LLP

FIG. 24

Customer Lease Summary Report		245 1 1:11 PM	
Friday, Aug 25, 2000	240	246	Acceptance Date:
Lease Number: 1011	243	244	Payment Frequency: Quarterly
Schedule Number: 1	242	244	Lease End Date: 08/01/2000
Schedule Date: 08/01/1997	243	244	Term: 36
MASTER LEASE INFORMATION			
Lessee: HITACHI AMERICA LTD Addr1: 2000 SIERRA POINT PARKWAY Addr2: City, State, Zip: BRISBANE, CA 94005 County: SAN MATEO Attention: PATRICIA GORDAN Title: PURCHASING MANAGER Phone:			
INSTALL LOCATION		BILLING LOCATION	
Company: HITACHI AMERICA LTD Addr1: 2000 SIERRA POINT PARKWAY Addr2: City, State, Zip: BRISBANE, CA 94005 County: SAN MATEO Attention: Title: Phone:		Company: HITACHI AMERICA LTD Addr1: 2000 SIERRA POINT PARKWAY Addr2: City, State, Zip: BRISBANE, CA 94005 County: SAN MATEO Attention: Title: Phone:	
FINANCIAL INFORMATION		Lease Rate Factor - Hard Costs: 0.0277565 Lease Rate Factor - Soft Costs: 0 Quarterly Equipment Rent: 10,517.37	
Total Items: 12		1 of 1	

FIG. 25

Adobe Acrobat - Termination Report.pdf

File Edit Document Tools View Window Help

Date: 05/15/2000 Time: 14:41:08

Lease End 253

Manufacturer Model 254

Description 255

Serial ID 256

Schedule Item 257

Equipment Cost 258

Lease Payment 259

EPLUS INC

Equipment Termination List

Lease EPLUS Ending 01/01/2002 - 12/01/2003

Install Location:

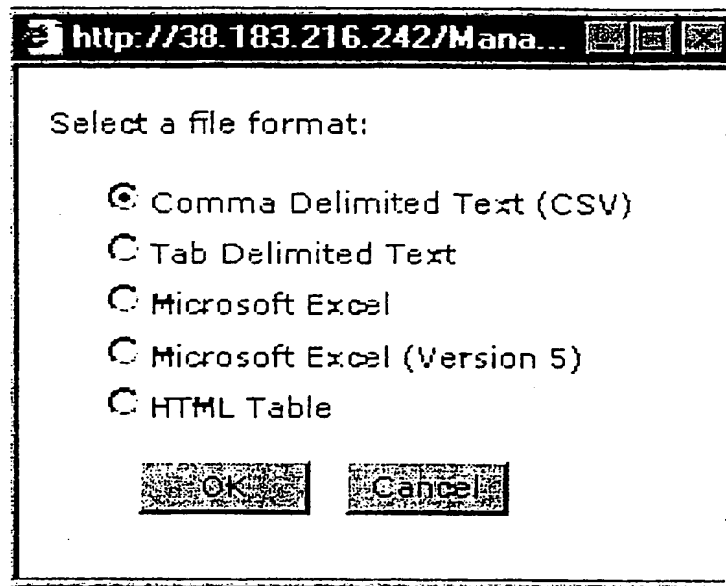
6 Items for Install location

Install Location: EPLUS GROUP INC
400 HERNDON PARKWAY
HERNDON, VA 20170
ASSET MANAGEMENT (703) 810-2593

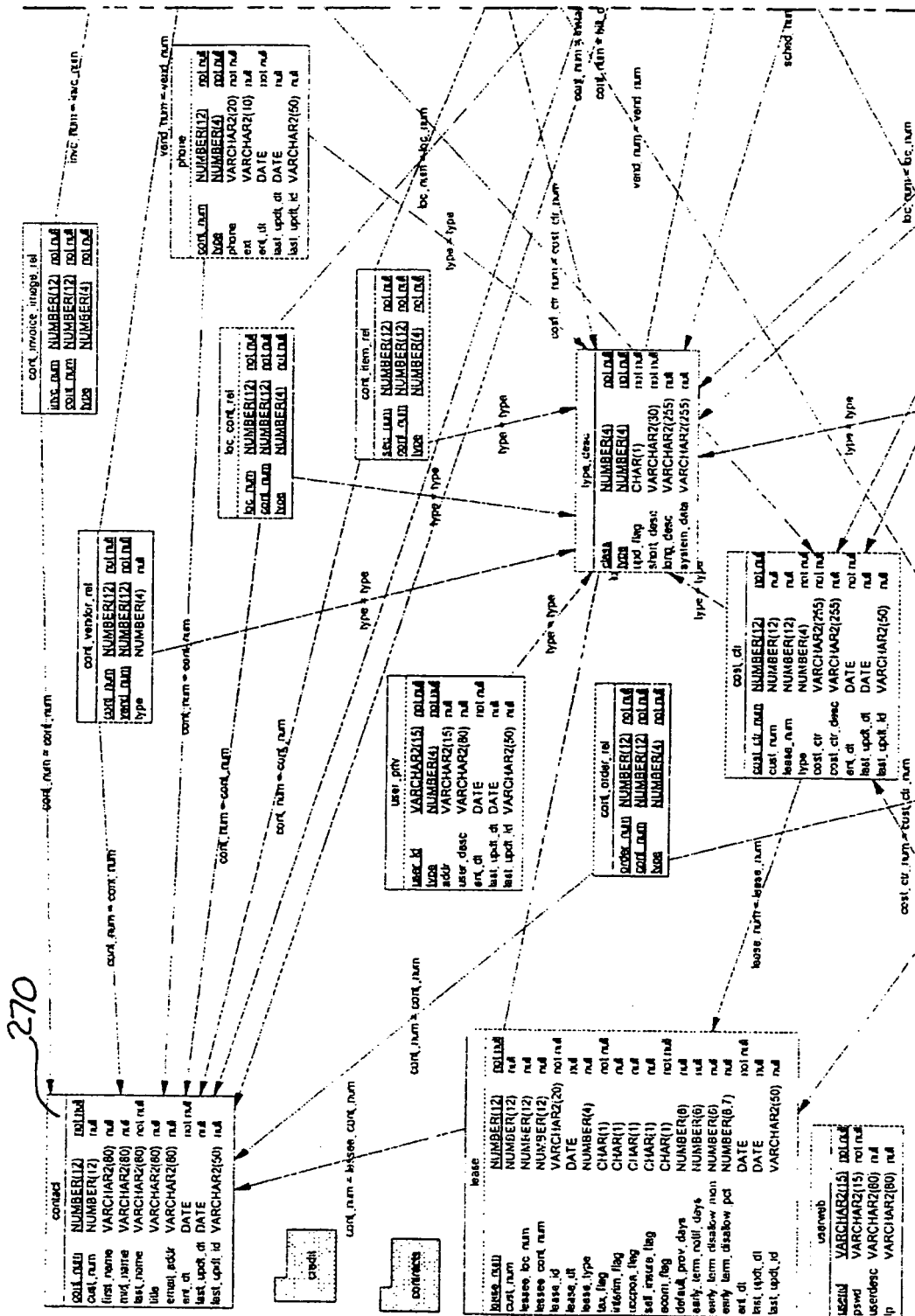
Date	Manufacturer	Model	Description	Serial ID	Schedule Item	Equipment Cost	Lease Payment
04/18/2003	ZEBRA TECH	1453-241-00000	T-402 STANDARD THERMAL TRANSFER PRINTER	NET249	1	0.00	0.00
04/18/2003	ZEBRA TECH	70940BLUE	POLYTRANS 3000 2"x1" LABEL (BLUE)	NET250	2	0.00	0.00
04/18/2003	ZEBRA TECH	70940GREEN	POLYTRANS 3000 2"x1" LABEL (GREEN)	NET250	3	0.00	0.00
04/18/2003	ZEBRA TECH	70940PINK	POLYTRANS 3000 2"x1" LABEL (PINK)	NET250	4	0.00	0.00
04/18/2003	ZEBRA TECH	70940YELLOW	POLYTRANS 3000 2"x1" LABEL (YELLOW)	NET250	5	0.00	0.00
04/18/2003	ZEBRA TECH	5588BK06409	WAXIRESIN 5508 SERIES 2.52X360	NET250	6	0.00	0.00
03/01/2003	DELL	220-3286	LATITUDE CPIR400G31/400MHZ	YSR1X	1	4,077.58	158.17
03/01/2003	DELL	220-3085	POWEREDGE G300 WITH REDUNDANT POWER PIII/500MHZ	YSR0T	2	15,174.88	588.91
03/01/2003	DELL	370-6367	P780 MONITOR 17"	49883TY1DC	3	325.00	12.61
03/01/2003	DELL	320-6367	P780 MONITOR 17"	49883UIY3X	4	325.00	12.61

1 of 1

FIG. 26



to FIG. 27b



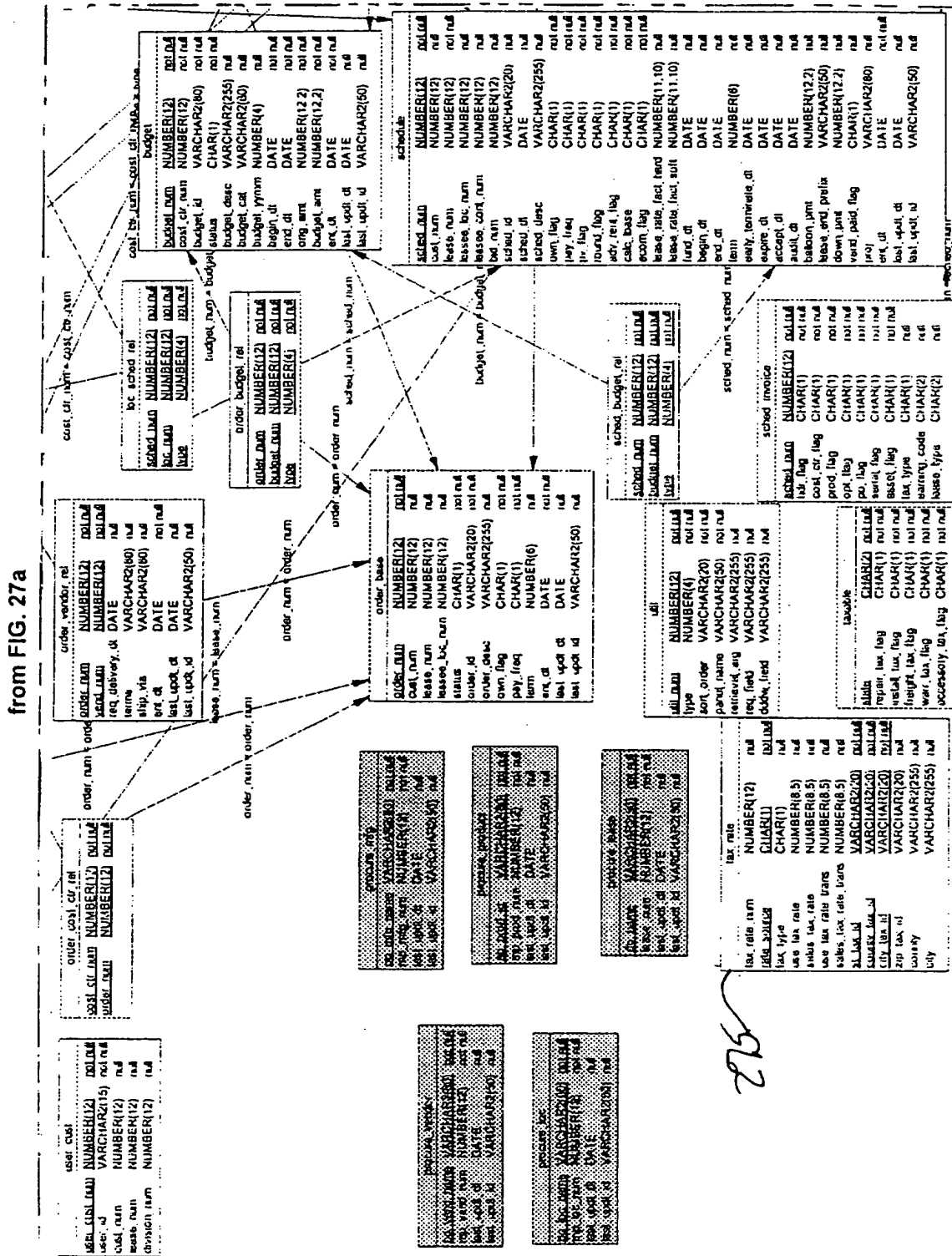


FIG. 27b

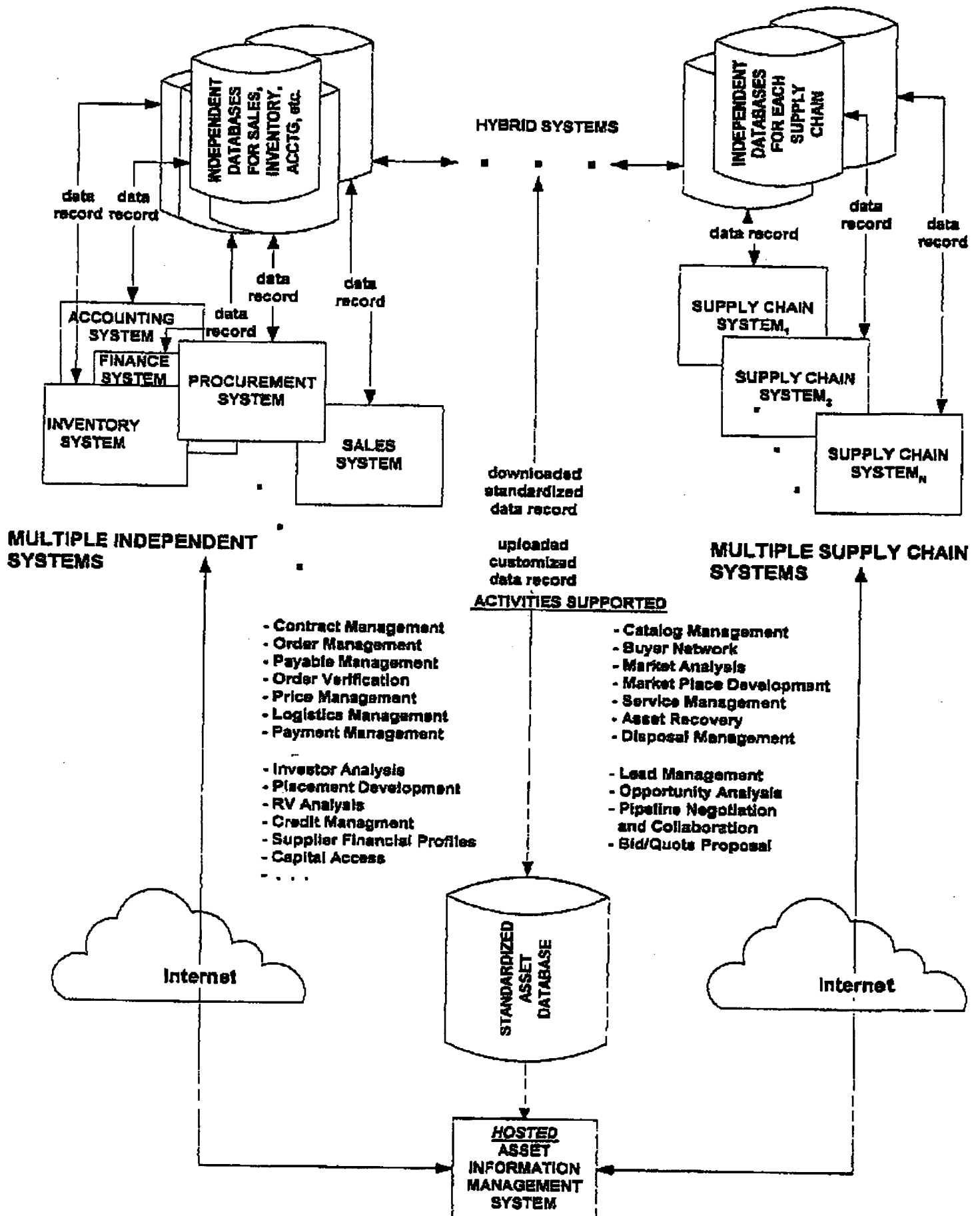


FIG. 27d

Application number/ Numéro de demande : 236/245

Documents of poor quality scanned
(request original documents in File Prep. Section on the 10th floor)

Documents de piètre qualité numérisés
(Pour obtenir les documents originaux, veuillez vous adresser à la Section de préparation
des dossiers, située au 10^e étage)



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